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ABSTRACT

This report presents the results of a study that examined the role and activities of reform coaches. Positions for reform coaches have been developed in a number of schools and districts in the San Francisco Bay Area through the Bay Area School Reform Collaborative (BASRC). The study examined the reform coach role, the functions it provides to the system, and its potential as a capacity-building strategy. Three sets of questions guided the study. (1) What does the role of the reform coach look like? What functions do reform coaches perform? (2) How do they negotiate their role in the system? (3) In what areas are coaches experiencing success in capacity building? In what areas are they experiencing the greatest challenges? Data for the study were collected from case studies of a sample of reform coaches in the BASRC network and from surveys of the larger population of coaches working in BASRC schools and districts. Findings suggest that reform coaches carry out important functions in the process of improving teachers and learning in schools by building leadership capacity for instructional improvement, knowledge management, and boundary spanning, and by directly coaching teachers and building capacity for instructional support. (Contains 34 references.) (WFA)

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April 2003

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Improving Instructional Capacity through School-Based Reform Coaches

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Introduction

The importance of leadership to instructional change has become a part of the conventional wisdom that informs contemporary school improvement processes. Reformers, somewhat contradictorily, identify principals as key pivots on which reform success hinges while also recognizing the need to distribute leadership—and thus ownership—of reform among teachers. There is agreement that instructional leadership is a central element of reform (Elmore, 2000), but there is a need for a deeper understanding of what such leadership can and should consist of and how and by whom it should be carried out. (Spillane, 2001; Hallinger and Heck,1998). Given the complex demands of reform, leadership that comes from outside of the narrow boundaries of traditional "administrator" positions is needed to support change across multiple levels of the school system (Smylie and Denny, 1990; Hatch, 2001). To date, there has been little exploration of how new leadership roles get integrated into schools and their reform efforts.

In addition, there has been little discussion of the daily practice or content of instructional leadership (Hallinger and Heck, 1998). Research has focused on more global conceptualizations of the role, on the nature of such leadership (e.g. that it is unpredictable and stressful), the effects of leadership (on student achievement) and the process of negotiating leadership (Heck and Hallinger, 1998). Some have advocated understanding instructional leadership by examining its functions and have begun to elaborate on some of these in a school (Firestone, 1996; Spillane et al, 2001; Firestone 1996; Firestone and Heller 1995). However, most of these functions depict instructional leadership in operation at a "macro" level—providing and selling a vision, designing school improvement strategies, implementing incentive structures for teachers, allocating system resources toward instruction, and so on (Elmore 2000)— that remain

somewhat distant from providing teachers with the skills they need to improve their work. Between the vision and the classroom lies the complicated process of building teacher capacity to enact change.

This paper describes a new capacity-building role designed to promote tighter connections between the macro aspects of instructional leadership and more micro-level classroom practices. Positions for "reform coaches" have been developed in a number of schools and districts in the Bay Area School Reform Collaborative (BASRC), a foundation-funded non-profit school reform organization that provides grants and professional development support to schools and districts in the San Francisco Bay Area. Here, we examine the reform coach role, the functions it provides to the system, and its potential as a capacity-building strategy.

Because the coach role is focused on *capacity*-building, it is important to clarify how we define this term at the outset. Building capacity in a school refers to the development of skills and knowledge in both individuals and in the organization as a whole. It often involves creating new structures and roles to broaden participation. Building capacity for changed practice is a critical, through often under-specified, aspect of instructional leadership. It involves:

- Building capacity for instructional leadership at the school level
- Managing knowledge resources by, for example, connecting teachers to relevant academic research or organizing student data into a format that is accessible to teachers
- Direct coaching of teachers on topics related to their practice, such as literacy or differentiated instruction
- Building capacity for instructional support amongst teachers to support their peers

These functions are based both on our observations of the actual enactment of the role by the coach, as well as our interpretation of the roles they play that are distinct from other actors in their schools.

Research Questions and Methodology

This paper presents the results of a study examining the role and activities of reform coaches in BASRC. Three questions guided this work:

- What does the role of the reform coach look like? What functions do reform coaches perform?
- How do they negotiate their role in the system?
- In what areas are coaches experiencing success in building capacity ? In what areas are they experiencing the greatest challenges?

The questions were addressed through two primary data collection methods : 1) case studies of a sample of reform coaches in the BASRC network and 2) surveys of the larger population of coaches working in BASRC schools and districts. Case studies of seven coaches documented their activities and experiences; these coaches worked in 16 schools in three school districts. The coach sample was selected from the larger population of 65 reform coaches belonging to the BASRC reform coach network in 2002-03. The coaches were chosen, based on several criteria, to represent: 1) the range of experience in the role in the network, from those who had been working as reform coaches for several years to those in their first year; 2) grade level (elementary, middle, and high) and 3) "best cases" of reform coaching. These best cases were selected based on our contact with coaches in the coaches network. The coaches we observed worked in districts and schools which served diverse student populations, in terms of socio-

economic status, student racial and ethnic background, and language proficiency in English (see Appendix 4 for a breakdown of student demographics in the schools in which these coaches worked.) Each of the seven coaches we followed worked with between one to five schools, at varying levels of intensity. Data collection mainly consisted of observations of coaches in meetings where they interacted with teams and individuals in their schools. We observed coaches over a four-month period, from late winter to early spring. Observational data were supplemented with one- to two-hour interviews conducted with the reform coaches, which investigated coach background, role definition, interactions with others at the school, supports for their work, and challenges they faced (see Appendix 2 for a copy of the interview protocol). We then coded and analyzed qualitative data through the use of a framework that was based on 1) BASRC's theory of action for the coach role and 2) the tensions to role enactment we observed early in data collection.

Surveys of reform coaches in the BASRC network were designed to locate case studies of coaches in the broader population. Surveys were administered to all reform coaches who belonged to the BASRC network in the spring of 2002; of the 48 coaches surveyed, 45 responded, a response rate of 96%. The survey examined coaching activities, distribution of time spent on these activities, variation in activities based on school reform variables, and professional background and areas of expertise. We conducted both descriptive and correlational analysis of the survey results. (See Appendix 1 for a copy of the reform coach survey).

The Reform Coach Role

Reform coaches are responsible for leading and coordinating many aspects of the instructional improvement process. It is their job to ensure that the school vision for instructional improvement gets enacted successfully in classrooms and that teachers have the tools and knowledge they need to make appropriate and significant changes in their practice. As a strategy, coaching can take many forms, but its essential objective is building capacity (Guiney, 2001).

To conceptualize how the coach role gets carried out, it is important to recognize that the term "coach" only captures a part of the work. Reform coaches in the BASRC model have an intentionally flexible job description that sees them as having responsibility for "facilitating the reform process in whatever ways appropriate" (BARG, 2002, p.2). Coaches serve as coordinators, teachers, professional development providers, data analysts and leaders as part of their coach role. For some, coaching teachers is only a small fraction of their work. As one coach described her role: "I do the coordinating part, which is sort of administrative assistant to the local collaborative[1], and I'm head of the local collaborative, and coach of the local collaborative. So it's really three pieces" (LVB11/7/02).

Coaches often take on the role while maintaining another position in the system; only one quarter of the coach population identifies as full-time coaches. The other three quarters were divided approximately equally between (1) individuals who were also teachers, (2) individuals who were also school administrators, and (3) individuals who were also district administrators. Because

[1] Clusters that include a number of schools and the district office apply to BASRC with a plan to work together on reform. This group is called the Local Collaborative.

coaches are affiliated with different parts of the system and because needs differ from school to school, there is wide variation in role implementation. Because this paper focuses on how coaches build capacity in schools, we studied coaches who do the role full-time or in addition to teaching.

In terms of bridging between administration and teaching, it appears that coaches are well positioned to accomplish the task. Coaches report having ongoing access to the multiple layers of the system. In fact, nearly 3/4 describe their responsibilities as working with teachers, school site leaders *and* district administrators in their work. On average, coaches report spending 18% of their time with teachers, individually or in grade level or department groups; 18% with whole school faculties; 25% with school reform leaders; 21% with district administrators; and 18% with staff from multiple schools.

Coaches in the BASRC reform effort bring a diverse range of skills and experiences to the role, making it impossible to define the "typical" career trajectory that led coaches to the position. Almost all coaches have been teachers in the past, but their length of experience spans a wide range (from 0-32 years). Twenty-one percent taught for 0-5 years, 55% from 5-15 years and 24% more than 15 years. About half have had administrative experience, most at the school rather than district level. Seventy-six percent had experience working in a BASRC school prior to becoming a coach, leaving almost a quarter who were learning BASRC's reform model as they were negotiating their role as leader of the reform.

Reform Coaches and BASRC's Theory of Action

Both the role and the work of the reform coach in BASRC schools and districts is significantly shaped by BASRC's theory of action. BASRC's theory of action for reform involves engaging individuals and teams from all levels of a school system (i.e., classroom, grade level or department, whole school, district) in an inquiry process targeted at improving instruction to close the achievement gap. Using what BASRC calls the "Cycle of Inquiry" at the classroom level requires teachers to define questions about their practice, identify and analyze data to target gaps in student achievement, attempt instructional changes designed to address deficiencies in their teaching and then seek an understanding of whether those changes have the desired outcome of improving student learning. The Cycle of Inquiry is an ongoing, site-specific process that is best implemented with support from coaches who are knowledgeable about the reform process, the content of instruction, and the context of the school. Since its inception, BASRC has operated on the assumption that schools and districts have unique cultures and contexts that are best understood by those working within them. Accordingly, BASRC has sought to help schools use their valuable internal resources (i.e., principals and teacher leaders) to support reform. The first incarnation of BASRC-funded, site-based change agents were "reform coordinators." During BASRC's first five years of funding schools (1996-2001), each school was encouraged to have a reform coordinator. Reform coordinators were often teacher leaders who coordinated the reform effort, communicated the reform work to stakeholders, served as a liaison with BASRC's central office and pushed their school to expand both the breadth and depth of the reform effort. These reform coordinators formed the base constituency of what would later become a network of site-based reform coaches.

In its second phase (2001-2006), BASRC began funding clusters of schools working together with their districts. Recognizing that managing reform at multiple levels of the system, at multiple schools and across schools with the goal of changing classroom practice to close the achievement gap required an evolution of the reform coordinator role, BASRC developed an expanded and more explicitly articulated model of site-based support for schools and districts. Drawing on research done on the importance of embedded professional development (Cochran-Smith and Lytle,1999; McLaughlin and Talbert, 2001; Lieberman, 1995) and the experience of Tony Alvarado and his use of a layered coaching model in San Diego and New York City's District 2 (Elmore, 1997), BASRC established a layered coaching model of its own. While BASRC staff provided direct coaching to schools, they simultaneously provided professional development centered on coaching to a network of site-based reform coaches. The purpose of developing this network of reform coaches was to ensure that reform would reach the classroom level and be supported at the school in an ongoing way. BASRC coaches did not have the capacity themselves to be in schools on a daily, or even weekly basis, so site-based reform coaches were convened and trained to do the important day-to-day work of coaching teachers and leaders to use an inquiry-based approach to improve teaching and learning.

BASRC outlined the role of the reform coach (see Appendix 3) and designed professional development around BASRC's own method of coaching. The professional development was delivered primarily through a reform coach network, a series of monthly meetings intended to build the skills, knowledge and capacities of site-based reform coaches. Reform coaches were paid a small stipend by BASRC to support their participation in the network and, to some extent, support the coaching work they do back at their schools and districts (many schools and districts

also used their BASRC grants to fund release time for reform coaches). Reform coaches were expected to have at least 0.2 FTE release time in order to have time to fulfill their coaching responsibilities. This expectation is an example of how BASRC tried to design the role of reform coach in such a way as to increase their potential for efficacy. While some conceivable challenges were addressed by virtue of the design and support of this reform coach role, many lessons surfaced as this coaching strategy was enacted throughout the collaborative. We will comment on those early lessons throughout this paper.

Building Instructional Leadership Capacity at the School Level

The reform coaches we studied worked within and between a number of decision-making and professional learning structures in the school. All of these functions were aimed at building the capacity of school staff to improve instruction in some way, whether at the level of planning and adjustment or learning and implementation. This section details findings around the functioning of reform coaches in areas of planning, monitoring, and adjusting reform strategies, through building the capacity of teachers and administrators to engage in and advance whole-school instructional change.

While their day-to-day activities around school leadership varied, almost all of the reform coaches we followed focused in some way on building instructional leadership capacity at the school level. Coaches recognized the importance of building leadership capacity; they rated "supporting reform leadership in schools" as the second most important area on which they should concentrate their coaching efforts[2]. Most commonly, they worked closely with the

[2] Other options (and their rankings) were: supporting instructional change among teachers (1st), helping staff understand the Cycle of Inquiry (3rd), participating in professional development that improves your coaching (4th),

principal to plan for and carry out changes as well as with teachers serving on leadership teams. These teams generally included the principal and teacher representatives of grades or departments in the school. The teams themselves had been formed to focus only on the improvement of the conditions of teaching and learning in the schools, rather than on the myriad of non-instructional responsibilities that are often the purview of such groups in schools. Because the coaches we studied generally worked in settings where schools had been attempting to improve instruction for some time, coaches interacted with existing leadership teams which had been constituted either by a previous reform coach or by the principal. Guidance of these teams had become an accepted part of the reform coach responsibility. In schools newer to reform, where a leadership team was either not in existence or not functioning as a representative body, the reform coach worked to create, organize, and define the responsibilities of the leadership team within the school, often in concert with the principal.

Reform coaches guided leadership teams to ensure that the reform work stayed on track, both from day-to-day and year-to-year. The reform coach set the meeting schedule, convened the team, and typically facilitated the meetings themselves. On a regular basis, reform coaches led teams to evaluate events such as a staff development day or grade level meetings and formulate next steps; they also facilitated a yearly planning process in the spring, supporting the team to adjust major strategies for the year ahead.[3] Generally, the reform coach led teams in discussions which could be characterized as evaluating, planning, decision-making, and problem-solving around schoolwide instructional improvement; these discussions were intended to influence all

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coordinating work across schools (5th), working with district leadership (6th), and managing reform coordination at the school level (7th).

[3] ROP refers to the BASRC Review of Progress. Teachers annually submit comprehensive documentation of the past year's reform progress and plans for next year.

teachers in the school. They facilitated agreement around priorities and direction for the school, key problems, and how to accomplish next steps. The reform coach, because she typically selected the topics for discussion, ensured that the team focused on instruction rather than on important but tangential issues such as student safety that could be dealt with in other committee structures. For example, reform coaches facilitated discussions around:

- data on student achievement to determine areas on which to focus and identify groups that are not at standard;
- intervention strategies, such as adding a language arts class and diagnostic testing for students far below standard, designed to accelerate their improvement;
- changing the school schedule to better serve students not at standard;
- instructional improvement efforts to adopt schoolwide, such as meta-cognitive strategies for reading comprehension
- teacher feedback around the strengths and weaknesses of school-based professional development
- adjustment to plans given reductions in resources from district and state budget cuts

When leadership teams raised issues unrelated to instructional change, the reform coach attempted to get them back on track. By introducing topics for discussion and agreement by leadership teams, reform coaches provided opportunities for more broad-based leadership to emerge and be enacted at the school level, rather than promoting reform in fits and starts through working only with interested and innovative teachers on the staff. In working with such teams,

coaches attempted to expand the oversight, understanding, and ownership of instructional improvement for the entire school beyond the principal or themselves.

Early lessons

In successful cases, coaches are integral players in all aspects of leadership around instruction at the school. They work closely with principals in determining how the school vision will get enacted and their input is valued. A reform coach, in characterizing her relationship with the principal, explained:

> Face-to-face conversations, I probably have 20 a week with her. We just spend a tremendous amount of time together. But then, I probably talk to her on the phone anywhere from 2-10 times a day, even on weekends...The communication is wonderful. I feel like it's a peer level, always. I feel like she's my colleague.

While the reform coach is often responsible for moving the leadership team toward decisions and action steps, they first consult with the principal when identifying and proposing major changes. As one described,

> I see myself as gathering information and synthesizing it and giving her the essential facts she needs to know. I'm the eyes in the back of her head. I try to do everything to make sure that as many things as I can to take things off her plate and allow her to 'listen to the synopsis and sign on the dotted line.'

is under review to listen, without interjecting, to the analysis of the sample by the other teachers in the group – the strengths they see in the work, the areas for improvement, etc. After providing them with a sense of how to use the tool, she asks them to try it out for about half an hour, then floats around the room to provide support to individual groups. She debriefs the session with the teachers and asks for suggestions for improvement, and, after listening to feedback, talks about the adjustments they will make for the next meeting.

Because the coach is responsible for planning and leading such sessions on an ongoing basis, she can provide opportunities that connect with current classroom activities and student work. Because she knows the school context, its reform focus, the overarching needs of focal students, and the general competencies of teachers, she is able to tailor her training to meet teachers at their level and attend to their concerns. In addition, she can ensure that sessions build on one another and are adjusted when the staff hits hurdles or struggles with particular concepts and activities, rather than simply delivering a pre-packaged session as is common with external support providers.

Coaching Groups of Teachers in the Cycle of Inquiry

Coaches also help teachers in smaller groups, often in grade and department meetings, to develop the critical skill of integrating systematic inquiry into their own practice. While some of these skills and accompanying tools are introduced at whole-staff sessions, it is in these smaller group settings that coaches are able to work intensively with teachers for longer periods to both ensure deeper understanding and application to real problems with teacher practice and student achievement.

The reform coach works to strike a balance between building teacher consensus and facilitating change versus taking a more directive, managerial stance. The coach is often responsible for identifying problems and gaps in student achievement schoolwide, bringing these to the leadership team, and proposing a solution. For example, in one case, a middle school reform coach had been in her position for two years. She was comfortable in her role and had strong facilitation skills and a keen ability to spot gaps in her school's reform work. In planning for reform strategies for the next year, she brought a summary of student data to the leadership team and pointed out that a number of students were operating "far below standard," a designation on the state's standards test. She formulated a proposal for an alternative language arts class which would better address the needs of these students, by giving them extra support at a slower pace. She had gained agreement from the principal and together they had identified a high-quality teacher to teach the course. After some discussion of each strategy, the team agreed to her proposals. While leadership team input and agreement is essential to identifying issues and fine-tuning such proposals, we found that reform coaches were often the key determiners of the direction of the school's instructional reforms, in concert with the principal.

This distribution of authority, with the reform coach acting as an intermediary, appeared to be a functional means of promoting instructional change. The reform coach in another middle school developed, with the principal, a major plan for changing the school's approach to instruction, from developmental to single-grade, as well as a restructuring of the schedule to allow for intensive, two-hour reading interventions in an attempt to address the low achievement of their diverse, high-poverty student population. Although she and the principal, based on assessment data, developed the initial proposal, the reform coach worked with the leadership team in a series

of day-long meetings to gain consensus and agree on the details for implementation. The principal, although highly involved, was not able to work closely with the team for such long periods, due to other responsibilities. The team itself, made up of classroom teachers, while able to act in an important advisory capacity, needed to react to rather than identify problems and generate solutions, due to their classroom responsibilities.

Coaches were active players in building the capacity of the school to act as a collective. They attempted to ensure that major decisions affecting the educational program were agreed upon throughout the school. In their efforts to build school-level instructional leadership capacity, they aimed to move their school faculties from a model of disconnected innovation at the classroom level to one of focus and coherence, responsive to real problems with student achievement.

Knowledge Management and Boundary Spanning

This paradigm of disconnected innovation at the classroom level is a typical one. Schools have traditionally operated as loosely coupled systems where the activities of administration have been disconnected from the technical core of teaching and learning in a school (Weick, 1976) and "successful instructional practices that grow out of research or exemplary practice never take root in more than a small proportion of classrooms and schools." (Elmore, 2000). Coaches help to coordinate teachers and administrators and ensure that their work is focused on instructional issues. Coaches also play a key role in seeking out knowledge that will support instructional improvement and coordinating the dissemination and utilization of that knowledge. In that sense, coaches address the problem of loose coupling and help change to reach the technical core.

Coaches are, in essence, knowledge managers in the multi-faceted, complex and data-intensive work of reform. They hold much of the knowledge about the school's reform effort which enables them to be both historian and forerunner of the reform effort. Knowledge management involves more than being a receptor for information and data; coaches play a key role in finding new knowledge outside of school boundaries, determining its value and applicability to their particular school context, and helping teachers make use of it in new ways in their classrooms (Schultz, 2001). As knowledge managers, coaches consume, analyze and diffuse information to help generate new knowledge among teachers and school leaders. This section of the paper is focused on what types of knowledge coaches manage and how they obtain it; the subsequent two sections focus on how coaches use their knowledge in coaching.

The Multiple Dimensions of Knowledge Management

In the coaches in our study sites, we found coaches to be organizing and/or providing four main types of knowledge to the school system within which they were working – data and assessment, equity, instructional practice and reform history/vision. What they did with these knowledge resources and how they integrated these into the school is discussed below and in the next section.

Data and Assessment-Teachers need data about what aspects of their instruction are not effective with students and what skills students are struggling to acquire in order to better focus their instruction. Administrators need data to make evidence-based decisions about implementation of reform at the whole school level, such as how to organize the school schedule

for extra instruction and intervention for students not meeting standards. The coaches we followed facilitated other educators' use of data in a number of ways, including:

- analyzing data and coming up with school level or classroom level statistics;
- preparing data so that it makes sense visually and is easier for teachers to understand;
- finding new assessments and supporting teachers to implement them
- helping to develop or select a districtwide data system;
- teaching data analysis skills to others.

Equity- Schools and districts who are committed to closing the achievement gap often find that they lack either the will, skill and/or capacity to create more equitable schools. This is an area where reform coaches can bring in much-needed resources or ideas. The reform coaches that we followed supported schools' equity work by:

- guiding teachers and administrators in disaggregating data in ways that clarified the achievement gaps;
- guiding teachers in using a classroom inquiry process that centered on "focal students" (low achieving students from the school's target group);
- bringing teachers and administrators to outside trainings on equity, race and/or privilege;
- bringing support providers into the school to help teachers and administrators examine issues of culture and climate.

Instructional Practice- We will examine later in this paper how reform coaches support teachers to examine their instructional practices and implement new practices, but coaches also play an important role in finding promising and innovative practices, including:

- reviewing research;
- investigating possible pre-packaged programs that the school might adopt;
- seeking out new instructional materials;
- connecting with organizations that provide instructional support in their schools' focus area;
- determine appropriate opportunities for teacher professional development.

Reform history/vision - Reform coaches are often the champions of reform. They have a specific vision of what individual schools need to do to improve teaching and learning. This vision is rooted in the coach's knowledge of the context of the school, what's happening presently and where they have been in the past. One teacher explained to the current coach why the staff would like to keep her for another year:

> We want you. You are the one who knows our school and the way we do things. You keep us on track. We worked with [another coach] for one day and he didn't understand the way we do it here. [He} spent the whole time modeling how they do inquiry at [another school] and we were all like, 'We figured out our own way two years ago.'(SLSOB022803)

Early Lessons

Although schools generally need support in all four of these areas (and in additional areas as well) coaches rarely have expertise in all areas. Coaches appear to coach on what they know, not

necessarily on system needs. Surveys revealed highly statistically significant relationships between what coaches reported feeling prepared to do and what coaches actually did. Coaches who felt prepared to lead instructional change worked at the classroom level more frequently than their peers who felt less prepared ($r=0.44$). The same was the case for coaches who felt prepared to analyze data ($r=0.59$) and coaches who felt prepared to lead the Cycle of Inquiry ($r=0.57$).

Coaches must make choices about where they can leverage the most change in the work. They must also contend with advancing a macro-level vision in the face of the innumerable immediate challenges of the school day. For these reasons and possibly others as well, most coaches appear to be focusing their efforts on the areas the feel competent to be effective.

While focusing on their areas of strength, some coaches also acknowledge that they need to learn new skills and report that they are eager to do so. One coach spoke candidly about her inadequate data analysis skills:

> That's one of the flaws in our system. I'm supposed to be the coach at Chipman, but I'm still lost on how to analyze scores. Its progress that I even know my password in [the district data system]. I think a really important thing is for each site to have is a person who can analyze and interpret data. Each school needs that capacity. I think that is an important thing that we should work on in meetings [of the coaches in the district] (SLKOB032803).

Although coaches are not always masters of all dimensions of reform, it appears that they are making plans to gain the knowledge that will make them better in the role.

Brokering Information across System Boundaries

Coaches span a variety of boundaries in their work and broker between a variety of individuals and groups. This brokering is a crucial element of knowledge management. It creates avenues for obtaining, distilling, and disseminating knowledge. Wenger describes brokering, in a word, as "complex. It involves the process of translation, coordination and alignment between perspectives" (1998, p.109). Coaches broker collaboration and knowledge sharing when they bring teachers and principals together to work on reform. In such cases, they are spanning *vertical* boundaries by bridging the communication gap that often exists between levels of the system (Schein, 1996). As another example of brokering up and down the system, coaches periodically serve as conduits of information between the district and the schools, helping schools to use the new district literacy assessment or helping the district to understand why an innovative school-based program should receive additional financial support.

Coaches also broker across *horizontal* lines by sharing a successful practice from classroom to classroom or school to school. As one coach describes:

> Now when we start a school on the Cycle of Inquiry, we have them first watch a group of teachers from Paden. Because when we started doing it at Paden…there were no models. There was nothing to watch. And we were kind of trying to figure this out and it was pretty amorphous. And it's still really hard and amorphous, but at least we know a little bit about what this looks like so they have some mental model, just from seeing it. It shows them the types of questions to ask and such (LVBIV110703).

As brokers, coaches might embody the link between two units in the system by carrying information between them. Alternatively, coaches might facilitate opportunities for *cross-unit*

collaboration in which members of different units engage in joint work. In one BASRC district, coaches have established cross-school collaboration time. Once a month, teachers meet by grade level to demonstrate successful lessons and review student work to establish shared standards for performance. As previously noted, coaches distribute their time relatively equally between working with teachers, whole school faculties, school site leadership, district leaders and groups from multiple schools. As such, they are well-positioned to spread knowledge across traditional system boundaries. In doing so, coaches intend not only to transfer knowledge between teacher groups in different schools, but reform progress as well; coaches connect teachers with those further along in instructional reform with those who are newer or more reluctant to change, with the aim of influencing and accelerating teacher understanding and buy-in to the change process itself.

There is one additional form of brokering that is essential for fostering continuous improvement. Coaches must bring *outside knowledge into the school*. Coaches do research on their own and attend professional development sessions, such as those sponsored by BASRC. It is through these vehicles that they acquire tools and skills to advance the work back in the school. It appears that coaches see value in these external opportunities to develop their own knowledge. Eighty-two percent rated the BASRC coaches network "helpful", "very helpful" or "extremely helpful".

Early Lessons

The logistical responsibilities associated with knowledge management and boundary spanning are greater than coaches often anticipate, yet their work with teachers and school leaders cannot happen without it. When asked how she spends a typical week, one coach revealed the

prominence of knowledge management activities in her work:

> That is a really hard question and you're not going to believe my answer. I spend a ton of time actually organizing the reform work. I have to keep track of *everything*-student data, teacher schedules, research findings, all the ROP stuff. [The principal] needs me to do that-there's no way it would happen without me-- but it always takes more time than I expect it to (SLKIV040203).

Coaches struggle with the balance of coordinating the reform work (in the form of identifying, codifying, and disseminating knowledge) and utilizing this knowledge and applying it with teachers and administrators in an effort to improve their practice.

As knowledge managers and boundary spanners, coaches run the risk of becoming the glue that holds the knowledge system together. It is important for the coach to establish knowledge management structures that are self-sustaining and that the coach coordinates dissemination of knowledge that is both broad and deep. If the coach is the only keeper of the reform knowledge, then the knowledge she has worked so hard to infuse into the school system will likely leave the system whenever the coach leaves.

Directly Coaching Teachers

An essential part of the coach's role as an instructional leader is the coaching of teachers around instructional practice. Although much of their time is consumed accessing the resources for coaching and managing the logistics associated with arranging coaching events, coaches' interactions with teachers around instructional issues is most closely linked with their ultimate objective of changing teacher practice and improving student achievement. Coaching builds instructional capacity in classroom teachers (Guiney, 2001), and coaches recognize this as the

crux of their work. When asked about the many possible responsibilities of their role, coaches indicated that "supporting instructional change" should receive the greatest emphasis. The two primary ways that coaches work with teachers on instruction are (1) leading professional development for whole school staff and (2) working with smaller groups of teachers to provide more intensive support for instructional change.

Coaches provide support to teachers around both best practices in literacy and the Cycle of Inquiry.[4] This eight-step process, described earlier, can serve as a guide to changing practice—and coaches serve as school-based guides and resources for this process. The inquiry process is complicated in that it requires teachers to develop competence around interpreting data and to learn to use new instructional methods. However, once it is in place, it can be a powerful catalyst to change how schools and teachers approach instructional issues (CRC, 2002). Reform coaches are instrumental in building teacher proficiency at inquiry.

Leading Professional Development for the Whole Staff

Professional development that is led by site-based reform coaches has the potential to foster continuous instructional improvement (Resnick and Glennan, 2002). Whereas much of the professional development in which teachers have participated in the past has had little impact because it was short-term and disconnected from the school context (Newman, et al. 2001), coaches can address the particular needs of sites in an ongoing way and bring teachers together around a common instructional focus. Research demonstrates that teachers need this type continuous, site-specific support to achieve deep, sustained change across all classrooms in a

[4] It is important to note that many reform coaches are also literacy coaches and there is significant overlap between their responsibilities in each of those roles.

school (Cohen and Hill, 2001; Cohen Raudenbusch and Ball, 2000). Coaches provide professional development for the whole staff either during release time at the end of the school day or at half- or full-day sessions several times per year on the school site.[5] During these sessions, coaches themselves deliver instruction to teachers, often alongside other teacher leaders. The topics of these sessions varied, but usually included either a review of new practices in reading or instruction on and practice of elements of the Cycle of Inquiry. Coaches design the sessions to allowed for significant collaboration amongst teacher groups, either by grade, department, or other configurations. The coach and other teacher leaders generally provide an overview of a skill, practice, or tool, set up an activity, then ask the teachers to work together to try out what they had learned.

A brief vignette illustrates this coaching role around professional development. One of the coaches we observed provides professional development to the entire school staff one hour after school, approximately two times per month. The elementary school is working on both improving writing and reading comprehension. On this day, the coach is introducing the staff to a tool to help them with a particular step in the Cycle of Inquiry, where teachers are asked to identify specific skills with which their focal students are struggling. The coach asked the teachers to each bring in samples of student writing to review with other teachers at their grade level. To help them do this, she teaches them about a tool called a Student Work Protocol. She begins the session by reminding them of where they are on the Cycle of Inquiry and how today's session fits in. She explains how to use the tool, which requires the teacher whose student sample

[5] In the schools in which we collected data, teachers generally met for one hour at the end of the school day once per week for professional development. Teachers are released from classroom instruction early on "minimum days," a term which refers to early student release several days per month. In California, teachers are also released all day on "buy-back" days three times per year; in BASRC schools, these days are often used to provide professional development to teachers.

For example, in one school, the coach offered several specific supports as a group of middle school English/ Language Arts teachers working on inquiry for the first time. To begin the meeting, she handed out a summary that included each student and their scores on three different reading and literacy assessments, which she had prepared in advance. She explained what the scores meant and answered teachers' questions. They discussed the need for targeting a small group of students in order to closely monitor progress. Next they reviewed test scores to narrow down which dimensions of literacy were giving focal students the greatest difficulty. By the end of this first meeting, the teachers were in agreement that decoding was the area they needed to work on. By their next meeting two weeks later, the coach had done research on decoding and came equipped with several instructional resources (some teachers did as well). Within a month, a few of the teachers were reporting that they were attempting new methods in class and reviewing test scores to monitor changes in the performance of focal students.

In the preceding example, the coach played an instrumental role in helping teachers to understand the data, define an instructional focus, determine how to evaluate progress, and obtain resources. She was also critical in ensuring that the group continued to meet and continue the inquiry process. This example also illustrates the many hats a coach must wear in carrying out coaching activities – data expert and resource provider, consensus-builder, and practice coach—described in this and previous sections. While reform coaches appear to be well-positioned to play these multiple roles, it is less likely that a full-time teacher or administrator would have the time or the skill to advance the reform work in this way.

Teachers recognize the value of inquiry when it points them to specific changes they need to make in the way they approach teaching and learning issues. One explained:

> As a teacher, this has been good for me in changing my thinking from what the kids aren't doing to what I'm not doing. We were talking about the math sequence in our department meeting the other day and we realized that our tentative plans to cut certain classes were not based on data. [The coach] helped our department to do inquiry into our needs. Now that we are looking at the data, we are needing to completely revise our plans, but what we offer will better serve students (SFIV22603).

The coach not only helps teachers to become more reflective about practice, but also helps them to recognize areas in which inquiry could inform instructional decisionmaking.

Early Lessons

When direct instructional support happens initial observations suggest that it can and does affect classroom practice. The exposure to research and strategies that the coach brings builds teachers' knowledge; the ongoing meetings that the coach facilitates offer teachers a forum to reflect on classroom experiences and continually analyze data. In sum, direct coaching on instruction is one key area where capacity gets built.

In interviews, several coaches reported that it is in doing this type of work that they feel most effective as a coach and on surveys many indicated that they would like to do this work more than they do. However, what coaches think they should be doing in the role has a weak correlation to what they actually do in practice ($r = 0.11$). They report spending more time on

reform leadership and on reform coordination than on instructional support.[6] This finding parallels past research on distributed leadership. Our data on how coaches spend their time corroborates Smylie and Denny's research which has shown that leadership positions intended to be carried out with an emphasis on the classroom level often end up looking like administrative roles in their enactment (Smylie and Denny, 1990).

There are several possible explanations for this phenomenon. It could be that coaches (surveyed at the end of their first year in the role) spent more time working with leaders to establish a plan for the reform work and their role in it than they will in future years. And/ or it could be that the coordination involved in a change effort that involves all levels of the system, while necessary, could be more time consuming than had been anticipated. It will be important to track whether coaches find more time for directly coaching teachers subsequent years with longitudinal data.

There is some indication that coaches concentrate more of their efforts on directly coaching teachers as the school gets further into the reform process. Coaches were asked to inventory their activities at schools "advanced on inquiry" and "beginning on inquiry". They spent considerably more time on certain instructionally focused activities with the advanced schools. For example, 76% of coaches helped teachers select and use multiple kinds of assessments in experienced schools, compared to only 57% in inexperienced schools. By contrast, coaches spend more time

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[6] Reform leadership was measured with items such as "work with school leadership to identify areas for improvement", "help to develop effective structures for shared leadership" and "work with the principal to develop his/ her reform leadership". Reform coordination was measured with items such as "prepare data summaries for staff review", "coordinate professional development" and "obtain outside resources". Instructional support was measured with items such as "work with teachers on instruction in the classroom", "facilitate teachers' collaboration to improve instruction" and "help teacher identify effective changes in classroom practice that address student achievement gaps".

negotiating their role in beginning schools (57% engaged in role negotiation frequently in beginning schools compared to 40% in advanced).

In addition, the amount of time coaches spend building teacher capacity varies by whether the coach holds another position in the school and what that position is. Not surprisingly, coaches who have no other role and coaches who are also teachers report spending significantly more time on instructional support than coaches who are also administrators.

Building Capacity for Instructional Support

As described earlier, reform coaches often represent a major source of direct support for teachers around instructional improvement, through coaching them in instructional practice and inquiry. In almost all cases, we found the coach to be taking on this role to some degree. However, whereas in some cases reform coaches served as the primary support at the grade, department, and even classroom level, in other cases coaches were attempting to develop the capacity of other teachers to become instructional leaders. In such instances, rather than representing the main source of on-site instructional support, these coaches were instituting a distributed coaching model. This involved recruiting teachers, creating formal leadership roles for them around instructional improvement within the school, and defining expectations for peer support, professional development, and collection of data and feedback around school reform strategies. As reform coaches spread coaching responsibilities across a cadre of teachers, they broadened the base of instructional leadership in the school and, in turn, increased the school's capacity to improve instruction.

Reform coaches employing this approach differed in terms of the teachers they recruited to be instructional leaders. One high school reform coach sent her entire leadership team to a training provided by the Strategic Literacy Initiative, a local support provider which trains teachers in a literacy approach called Reading Apprenticeship (a set of strategies designed to address both the affective and cognitive aspects of adolescent reading comprehension). After the leadership team completed their training, the team shared the responsibility of planning and facilitating professional development for their whole staff around these literacy strategies. Each leadership team member was responsible for teaching the Reading Apprenticeship strategies to a small group of their colleagues. By designing the professional development this way, the reform coach was seen as but one of many instructional leaders. Another reform coach, also at the secondary level, recruited teachers both from within and outside of the leadership team, in an attempt to disperse leadership responsibilities to a larger group within the school. Still another reform coach at elementary had chosen teachers from each grade level to serve as peer coaches. Reform coaches also differed in how they choose to develop the expertise of these teacher leaders, which seemed to depend on their own level of expertise in literacy. While they were frequently the first to find and develop expertise in a promising program or instructional strategy, reform coaches commonly brought teacher leaders to trainings provided by an outside support provider, as in the example above. Another coach who had been a reading specialist in the district for several years trained teacher leaders herself in Reading Apprenticeship strategies. In a few cases, where reform coaches did not have a deep understanding of particular strategies, they attended outside training alongside teacher leaders and concurrently developed new knowledge and skills.

Finally, coach expectations of teacher leaders varied. Some asked these teachers to plan and facilitate professional development for the whole staff a few times a year, while others also expected them to facilitate collaboration amongst small groups of teachers on a regular basis. For example, a reform coach at a junior high worked with teachers from each department designated as literacy coaches. As in the high school example above, the reform coach took these literacy coaches to professional development outside of the school approximately one day per month, and, because she did not have a background in adolescent literacy herself, she attended the training with her coaches. Back at school, she coordinated bi-monthly meetings of her literacy coaches. She had defined their responsibilities as two-fold; as in the high school example above, she worked with them to plan for and facilitate professional development for the entire staff during all-day sessions several times per year. Additionally, she coached them to lead department meetings once per month, at which they facilitated discussion around Reading Apprenticeship literacy strategies and led teachers through steps in the Cycle of Inquiry - identification of focal students, examination of assessment data, selection of practices, and so on. Besides providing direct support to teachers, as described in greater detail in the previous section, the literacy coaches communicated questions, ideas, and challenges around reform from their teachers back to the reform coach.

Even though some reform coaches had developed a distributed coaching model, they continued to play a central role with teacher leaders in the building of instructional leadership capacity within the school. They scheduled and facilitated meetings, set the agenda, brought new issues to the group for consideration, and solicited input and developed consensus around next steps. In one case, the reform coach had begun to expand and renegotiate what teacher instructional

leadership meant within the school. After the teacher coaches had been working with their teacher groups for some time, she presented them with data from the staff that indicated a strong desire for classroom coaching. She suggested they begin to provide one-on-one support and modeling for teachers around literacy strategies and then worked with the coaches to define what this might look like. The coaches decided not to position themselves as experts in the strategies, but rather as peer supporters who would discuss with teachers the questions and issues they were facing and offer suggestions. The reform coach also suggested videotaping and inviting teachers into their classrooms to observe them implementing Reading Apprenticeship classes; she began by inviting the coaches and other staff to her own classroom the next week.

Early Lessons

Although not all reform coaches work at this intermediate level, in between directly coaching teachers and guiding leadership teams, coaching other teacher leaders to be instructional leaders appears to be an important element of strengthening a school's capacity to improve. If instructional leadership must be on-site and ongoing and the most effective professional development "needs to be rooted in practice and the communities in which educators work" (Resnick and Glennan, 2002), then training a group of instructional leaders made up of representatives from every grade level or department enables coaching to happen within 'the communities in which educators work'. An instructional leader situated in a department or a grade level will know the needs of that department of grade level, more so than even the principal or reform coach.

Because the reform coach position is new to the system, many reform coach positions are vulnerable during the current budget crisis in California. This event reinforces the need to more widely distribute knowledge, expertise and responsibility for instructional leadership. The development of a distributed coaching model by the reform coach may ultimately prove to preserve coaching and instructional support for teachers when positions are cut. This approach to reform coaching may also prove to have other benefits, such as greater peer accountability and greater teacher access to support.

We found reform coaches to be uniquely positioned to facilitate the development of distributed, site-based instructional support. As knowledge managers, they seek out external sources of new knowledge and ideas to bring into the school system. They are then able to develop leadership around this new knowledge in an ongoing way.

Legitimacy

Roles for coaches are new in education; they are only partially defined at the time of their inception and become clearer as they are performed (Nicholson, 1984; Hackman and Oldham, 1980). Coaching does not carry the legacy of institutionalized expectations that is associated with traditional roles in education. While this lack of institutionalized expectations my benefit the coach when working with teachers in that teachers will not automatically associate coaches with evaluation or accountability, the coach may also face obstacles in determining the scope of the work and in carrying out the work. The role itself has not yet been validated as a necessary part of the education system, distinct from teaching or administration (Neufeld and Guiney, 2000). Hence, it is up to individual coaches—through their interactions with others—to carve out the

parameters of the role and gain legitimacy for themselves (Abbott, 1988; Halpern, 1992; Nelsen and Barley, 1997). As coaches negotiate reform work, they are also negotiating their own legitimacy as leaders of reform. Attaining legitimacy is an important initial outcome of coach work. That is, coaches are unlikely to be effective at building teacher capacity and school capacity until their role is accepted as legitimate by others. The challenge of gaining legitimacy permeates all dimensions of the coach's capacity-building work previously discussed in this paper.

As we have demonstrated here, the list of possible job related tasks for the coach is long, leaving the role open to wide variation in implementation. Coaches lack formal certifications that might legitimate claims to authority over particular leadership functions. They operate in the absence of any precedent for performance and gain much of their training on the job.[7] While the addition of coaches holds promise for accelerating change, their efficacy in the role appears to hinge on their legitimacy. Coaching roles are intended to help build capacity, but their introduction poses challenges to organizing even as it creates opportunities for advancing teacher and school learning.

Consistent with past research and theory on role development (Biddle, 1979; Zelditch and Walker, 1984), we find that in order for coaches to be effective, teachers and administrators must accept the creation of the role, the person who takes it on, and the activities that person engages in as legitimate To clarify,

- Other educators must see the creation of the coach role as a necessary addition to the school

[7] In this sense, the introduction of the coach role into the system poses challenge similar to the introduction of teacher leader roles as demonstrated in Wasley (1991) and Miles, Saxl and Lieberman (1988).

staff.

- Other educators must perceive the person who becomes coach as having the appropriate background and skills to support school improvement.
- Other educators must be able to observe that the activities of the coach are focused on teaching and learning issues.

Legitimacy does not necessarily follow formal designation as a leader (though having that structural endorsement typically helps). Legitimacy is developed through a process of social exchange (Emerson, 1962; Cook, 1987). That is, teachers and administrators come to see the coach as a legitimate leader through repeated interactions in which the coach demonstrates that coaching will help them to reach personal and collective goals. We have observed that coaches who demonstrate a high level of legitimacy in their schools share two particular characteristics in common. The first is social capital and the second is knowledge that is not redundant with the knowledge of others in the school.

Social capital refers to the coach's position in the school network of roles and relationships (Coleman, 1988). Coaches need ties that give them access to the people and resources they need to move the reform forward. Strong ties are the mechanism through which coaches can gain information and influence and spread group commitment to reform (Sandefur and Laumann, 1998). Of course, not all coaches begin the work with the requisite connections and relationships. Coaches must often pay attention to cues from others to cultivate social capital. One coach described the approach she uses herself and teachers her lead teachers:

> The other thing that I find helps with my credibility is my willingness to listen…
>
> Sometimes when I coach the lead teachers I say, 'When someone comes to you with an

> argument, listen carefully because the reality for that person is true even if you disagree—and listen because it keeps you connected...It's a different perspective. And because you listen to them, they'll listen to you.'

Among our case study schools, coaches that were showing signs of initial effectiveness in the work of supporting instructional change (1) had frequent access to the principal, (2) had success in bringing key teachers together to help catalyze schoolwide change, and (3) were well-known and respected by teachers. They had strong ties in the school and were using them as leverage in their work.

As previously noted, coaches must also bring knowledge and expertise to the role. Yet, schools vary in the types of knowledge that they expect coaches to provide. Often they are seeking whatever they feel is lacking among the rest of the staff. In our case study sample, one coach was particularly recognized for her expertise in data analysis, another for her understanding of the school history and vision for the future, and several others for their knowledge of literacy (in terms of programs, strategies and assessments).

While several types of knowledge are important, they are not of equal value in a coach's efforts to improve instruction. Coaches' lack of specific content knowledge may prove problematic in their attempts to focus on instructional change. In a study of reform leadership in the Chicago Public Schools, Spillane, Diamond, and Halverson (2002) found that teachers were far more likely to seek out the help of other teachers on instructional issues, even when non-teaching specialists were available. Teachers felt that other teachers were more likely to have the knowledge they were seeking. Coaches must have unique and valuable instructional knowledge

or risk being unable to affect the technical core of teaching and learning in schools.

Conclusion

This paper provides an overview of a new instructional leadership role, the reform coach. Documentation and examination of the activities of reform coaches suggests that they carry out important functions in the difficult process of improving teaching and learning in schools—building leadership capacity for instructional improvement, knowledge management and boundary spanning, directly coaching teachers and building capacity for instructional support. Findings indicate that reform coaches can serve as a bridge between a vision of improvement and its enactment, through day-to-day support for teachers and others in leadership roles. Because reform coaches interact with multiple levels of the school system, they are uniquely positioned to bring focus and coherence to improvement processes that are often vulnerable to fragmentation. They attempt to build capacity not at a single part of the school system, but at every level with influence over teaching and learning – helping teachers to improve their individual knowledge and skills, supporting grade and department teams to collectively solve problems, and prompting leadership teams to make difficult decisions that affect whole schools, rather than promoting only pockets of excellence and mixed opportunity for students. The role represents a first step in the formal distribution of leadership beyond the principalship, while maintaining the close ties necessary to ensure reform efforts are supported.

Although initial findings seem to point to the potential of the role in providing instructional leadership, the study was limited in important ways. Initial data analysis did not attempt to thoroughly examine the effectiveness of the reform coach in realizing goals for instructional

improvement. The study did not investigate the perceptions of other actors in schools with which coaches interact. Because the study was relatively short term, it did not document changes in either role definition or activities over time, including potentially negative influences on improvement processes. Because the study was conducted during a year of severe budget shortages in California, it is unclear if many reform coaches will be able to continue working in this capacity. While early findings suggest the benefits of expanding instructional leadership to roles such as that of the reform coach, it is important to consider the impact of the removal of such leaders from the reform process at crucial points. Given early findings around the contribution of the role, investigation of such questions represent potentially valuable areas for further research.

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BAY AREA SCHOOL REFORM COLLABORATIVE

LOCAL COLLABORATIVE

COACH SURVEY

Spring 2002

CRC: School of Education, CERAS Building, Stanford University, Stanford, CA 94305-3084 (650) 723-4972
MDRC Regional Office: 475 14th Street, Suite 750, Oakland, CA 94612 (510) 663-6372

LOCAL COLLABORATIVE COACH ROLE

These questions concern the ways in which your coaching role is being defined in your Local Collaborative (LC).

coaching responsibilities Check (v) one.

Coach at one school only	1 ○
Coach at the district level only	2 ○
Coach with responsibilities at multiple schools, but not in the district office	3 ○
Coach at one or more schools and in the district office	4 ○
Other (specify): _____	5 ○

positions, in addition to LC coach

_____	☐ a
Classroom teacher	☐ b
School site administrator	☐ c
Counselor	☐ d
Support provider	☐ e
Coordinator of another grant (specify) _____	☐ f
District administrator (specify) _____	☐ g
Other (specify:) _____	☐ h

Employed part-time	1 ○
Employed full-time	2 ○

experience with BASRC

No prior formal experience with BASRC	☐ a
Teacher in a BASRC school	☐ b
Administrator in a BASRC school	☐ c
Administrator in a BASRC district	☐ d
Reform coordinator in a BASRC school	☐ e
Support provider in a BASRC school	☐ f
Other (write in:) _____	☐ g

number of coaches working with schools in your LC

a.	LC Coach	_____
b.	Literacy Coach	_____
c.	Data Coach	_____
d.	Reform Coordinator	_____
e.	Other (specify)_____	_____

In your coaching role ***percentage of your time have you spent working with...***

a.	Individual teachers in their classrooms	%
b.	Grade level or department groups	%
c.	Reform leaders in the schools	%
d.	Whole school faculty	%
e.	District administrators	%
f.	Staff from multiple schools around joint work	%

(100%)

how often did you do each of the following

with those LC schools least and the most advanced on inquiry?

	School most advanced on inquiry				School least advanced on inquiry			
	Never	Once	A few times	Many times	Never	Once	A few times	Many times
Cycle of Inquiry								
a. Focus on deepening and broadening the work on the school's focused effort.....	1O	2O	3O	4O	1O	2O	3O	4O
b. Help the school use the "Cycle of Inquiry" to address equity issues.....	1O	2O	3O	4O	1O	2O	3O	4O
c. Help teachers set measurable goals for student performance	1O	2O	3O	4O	1O	2O	3O	4O
d. Help the school set measurable goals for evaluating teacher practices.....	1O	2O	3O	4O	1O	2O	3O	4O
e. Help teachers select and use multiple kinds of assessments to evaluate students' progress.....	1O	2O	3O	4O	1O	2O	3O	4O
f. Other (write in)_____	1O	2O	3O	4O	1O	2O	3O	4O
Instructional Support								
g. Work with teachers on instruction in the classroom.....	1O	2O	3O	4O	1O	2O	3O	4O
h. Facilitate teachers' collaboration to improve instruction.....	1O	2O	3O	4O	1O	2O	3O	4O
i. Help teachers identify effective changes in school / classroom practices to address student achievement gaps.....	1O	2O	3O	4O	1O	2O	3O	4O
j. Other (write in)_____	1O	2O	3O	4O	1O	2O	3O	4O

Question 7**(Continued)**

		School most advanced on inquiry				School least advanced on inquiry			
		Never	Once	A few times	Many times	Never	Once	A few times	Many times
	Reform Leadership								
k.	Negotiate my coaching role with the school.....	1○	2○	3○	4○	1○	2○	3○	4○
l.	Work with school leadership to identify areas for improvement.....	1○	2○	3○	4○	1○	2○	3○	4○
m.	Help develop effective structures for shared leadership.....	1○	2○	3○	4○	1○	2○	3○	4○
n.	Work to involve more teachers in inquiry-based reform	1○	2○	3○	4○	1○	2○	3○	4○
o.	Work with the principal to develop his/her reform leadership	1○	2○	3○	4○	1○	2○	3○	4○
p.	Other (write in)_____	1○	2○	3○	4○	1○	2○	3○	4○
	Reform Coordination								
q.	Prepare data summaries for staff review.....	1○	2○	3○	4○	1○	2○	3○	4○
r.	Manage the school's accountability reporting demands.....	1○	2○	3○	4○	1○	2○	3○	4○
s.	Coordinate professional development.....	1○	2○	3○	4○	1○	2○	3○	4○
t.	Obtain outside resources (e.g., grants, support providers).....	1○	2○	3○	4○	1○	2○	3○	4○
u.	Other (write in)	1○	2○	3○	4○	1○	2○	3○	4○

district office personnel

		Never	Once	A few times	Many times	N / A
a.	Work with district leadership to refine the reform agenda.....	1O	2O	3O	4O	5O
b.	Help the district central office staff use the "Cycle of Inquiry"....	1O	2O	3O	4O	5O
c.	Negotiate my coaching role at the district central office.....	1O	2O	3O	4O	5O
d.	Help develop effective structures for reform leadership in the district.....	1O	2O	3O	4O	5O
e.	Prepare data summaries for staff review.....	1O	2O	3O	4O	5O
f.	Work to involve more district central office staff in inquiry-based reform.....	1O	2O	3O	4O	5O
g.	Manage the district's accountability reporting demands.....	1O	2O	3O	4O	5O
h.	Aid district and schools in aligning priorities across the LC.....	1O	2O	3O	4O	5O
i.	Work with district leadership to identify areas for improvement...	1O	2O	3O	4O	5O
j.	Help district leaders set measurable goals for central office improvement.....	1O	2O	3O	4O	5O
k.	Other (write in)	1O	2O	3O	4O	5O

coordinating work across schools within your LC

		Never	Once	A few times	Many times
a.	Organize professional development sessions that involve more than one school.....	1O	2O	3O	4O
b.	Arrange for teachers from one school to present or observe at another	1O	2O	3O	4O
c.	Arrange for teachers from other schools to interview or talk with one another.....	1O	2O	3O	4O
d.	Organize meetings that bring together administrators from multiple schools.....	1O	2O	3O	4O
e.	Facilitate meetings between district personnel and school personnel...	1O	2O	3O	4O
f.	Share lessons from one school at another (coach as connection).....	1O	2O	3O	4O
g.	Present data to a group that includes more than one school.....	1O	2O	3O	4O
h.	Initiate a newsletter or alternate form of cross-school written communication.....	1O	2O	3O	4O
i.	Obtain outside resources for the LC.....	1O	2O	3O	4O
j.	Other (write in)	1O	2O	3O	4O

In your opinion

		Low emphasis				High emphasis
a.	Helping staff to understand and use BASRC's "Cycle of Inquiry".....	1O	2O	3O	4O	5O
b.	Supporting instructional change among teachers.....	1O	2O	3O	4O	5O
c.	Supporting reform leadership in schools.....	1O	2O	3O	4O	5O
d.	Managing reform coordination	1O	2O	3O	4O	5O
e.	Working with district leadership.....	1O	2O	3O	4O	5O
f.	Coordinating work across schools in your LC.....	1O	2O	3O	4O	5O
g.	Participating in professional development that improves your work as a coach.....	1O	2O	3O	4O	5O
h.	Other (write in)_____	1O	2O	3O	4O	5O

how much those activities / strategies helped you in supporting the progress of your LC.

		Not helpful				Extremely helpful
	BASRC Activities and Tools					
a.	Tools for diagnosis (dashboard, benchmarks, rubrics).....	1O	2O	3O	4O	5O
b.	Tools for capturing agreements (MOU, workplan, record of agreements, budget, COI map).....	1O	2O	3O	4O	5O
c.	Tools for coaching (inquiry interview and contracting skills).....	1O	2O	3O	4O	5O
d.	Receiving feedback on work (ROP, classroom COI tool, change portfolio).....	1O	2O	3O	4O	5O
	Opportunities for Building Relationships					
e.	Coaches' Network.....	1O	2O	3O	4O	5O
f.	Talking with a partner coach in your LC.....	1O	2O	3O	4O	5O
g.	Talking with your BASRC coach.....	1O	2O	3O	4O	5O
h.	Networking with coaches from other LCs.....	1O	2O	3O	4O	5O
i.	BASRC clarification of role expectations.....	1O	2O	3O	4O	5O
j.	Literacy Learning Community.....	1O	2O	3O	4O	5O
k.	Data, Standards and Assessment Learning Community.....	1O	2O	3O	4O	5O
l.	Leadership network.....	1O	2O	3O	4O	5O
m.	Coaches Network Listserve.....	1O	2O	3O	4O	5O
n.	Summer Institutes.....	1O	2O	3O	4O	5O
o.	Other (specify)	1O	2O	3O	4O	5O

CONDITIONS IN THE LOCAL COLLABORATIVE

These questions are designed to measure the range of readiness for reform among different schools at the start of this second phase of BASRC's work. Individual schools and districts will never be identified in reporting.

	Anchor School	Non-Anchor School A	Non-Anchor School B	Non-Anchor School C	District Office
a. **Site Name (write in)**					
b. I am the primary coach at this site (Check if Yes).....	❑as	❑a	❑b	❑c	❑do
c. How extensively is the staff engaged in inquiry?					
A few individuals only.....	1❍	1❍	1❍	1❍	1❍
Few departments / grade levels.....	2❍	2❍	2❍	2❍	2❍
Most departments / grade levels.....	3❍	3❍	3❍	3❍	3❍
All departments / grade levels.....	4❍	4❍	4❍	4❍	4❍
Don't know.....	7❍	7❍	7❍	7❍	7❍
d. How would you rate the site's maturity in inquiry?					
Beginning.....	1❍	1❍	1❍	1❍	1❍
Emerging.....	2❍	2❍	2❍	2❍	2❍
Systematic.....	3❍	3❍	3❍	3❍	3❍
Sustainable.....	4❍	4❍	4❍	4❍	4❍
Don't Know.....	7❍	7❍	7❍	7❍	7❍
e. How extensively are core practices changing as result of inquiry?					
A few individuals only.....	1❍	1❍	1❍	1❍	1❍
Few departments / grade levels.....	2❍	2❍	2❍	2❍	2❍
Most departments / grade levels.....	3❍	3❍	3❍	3❍	3❍
All departments / grade levels.....	4❍	4❍	4❍	4❍	4❍
Don't know.....	7❍	7❍	7❍	7❍	7❍

f. How committed are site leaders to the goal of closing achievement gaps?					
Not committed.....	1○	1○	1○	1○	1○
Somewhat committed.....	2○	2○	2○	2○	2○
Mostly committed.....	3○	3○	3○	3○	3○
Very committed.....	4○	4○	4○	4○	4○
Don't know.....	7○	7○	7○	7○	7○
g. To what extent is this site working with other LC partners on joint reform work?					
Not at all.....	1○	1○	1○	1○	1○
Occasionally.....	2○	2○	2○	2○	2○
Regularly.....	3○	3○	3○	3○	3○
Intensively.....	4○	4○	4○	4○	4○
Don't Know.....	7○	7○	7○	7○	7○
h. Which best describes staff receptiveness to coaching?					
Few or no staff members receptive...	1○	1○	1○	1○	1○
Some staff members receptive.....	2○	2○	2○	2○	2○
Most staff members receptive.....	3○	3○	3○	3○	3○
Whole staff receptive.....	4○	4○	4○	4○	4○
Don't know.....	7○	7○	7○	7○	7○
i. To what extent do you feel successful in providing the kind of support you would like to provide for staff at this site so far?					
Not very successful	1○	1○	1○	1○	1○
Somewhat successful.....	2○	2○	2○	2○	2○
Mostly successful.....	3○	3○	3○	3○	3○
Very successful.....	4○	4○	4○	4○	4○

relationships within your LC

		Strongly disagree				Strongly agree
a.	Educators throughout our Local Collaborative provide support and feedback to one another	1O	2O	3O	4O	5O
b.	The relationship between schools in our Local Collaborative is one of respect and trust	1O	2O	3O	4O	5O
c.	The relationship between Local Collaborative schools and the district is one of respect and trust	1O	2O	3O	4O	5O
d.	Schools in our Local Collaborative have developed a shared understanding of how to further our reform work	1O	2O	3O	4O	5O
e.	Schools in our Local Collaborative provide the district meaningful feedback on strategies to better support inquiry-based reform	1O	2O	3O	4O	5O
f.	The district is accountable to our Local Collaborative for actively supporting inquiry-based reform	1O	2O	3O	4O	5O
g.	District leaders have developed important knowledge and skills to support inquiry-based reform efforts in our Local Collaborative	1O	2O	3O	4O	5O
h.	The work of the Local Collaborative is helping the district to address the special needs of low-performing schools	1O	2O	3O	4O	5O

the district(s) in your Local Collaborative.

	This district…	Strongly disagree				Strongly agree
a.	Uses the experiences of schools to improve its strategies and approaches for supporting reform	1O	2O	3O	4O	5O
b.	Understands and is responsive to each school's data needs	1O	2O	3O	4O	5O
c.	Is involved in LC work with schools	1O	2O	3O	4O	5O
d.	Is doing inquiry into its own practices	1O	2O	3O	4O	5O
e.	Collects and uses student achievement data to improve its support for schools	1O	2O	3O	4O	5O
f.	Examines data to evaluate the effectiveness of its programs and policies in supporting each school's improvement efforts	1O	2O	3O	4O	5O
g.	Helps schools to use information about student achievement relative to standards in order to improve instruction	1O	2O	3O	4O	5O
h.	Provides different levels and kinds of support based on data on student skills gaps	1O	2O	3O	4O	5O
i.	Fosters communication among schools in the district	1O	2O	3O	4O	5O
j.	Coordinates professional development opportunities that respond to data about student needs	1O	2O	3O	4O	5O

role of anchor schools

	The Anchor school(s)…	Strongly Disagree				Strongly Agree	Do not know
a.	Proactively supports the inquiry practices of other schools in the LC……	1○	2○	3○	4○	5○	7○
b.	Invites other schools in the LC to visit their site……	1○	2○	3○	4○	5○	7○
c.	Shares data analysis practices with other LC schools……	1○	2○	3○	4○	5○	7○
d.	Takes responsibility for creation of data analysis systems for use across the LC……	1○	2○	3○	4○	5○	7○
e.	Is viewed as a resource by other LC schools……	1○	2○	3○	4○	5○	7○
f.	Offers support provider recommendations to other LC schools……	1○	2○	3○	4○	5○	7○

Challenges:

Resources:

PROFESSIONAL BACKGROUND

Individuals bring a wide variety of expertise to coaching. The following questions will help us to understand how you came to the coaching role.

a.	Classroom teacher	_____
b.	School site administrator	_____
c.	Counselor	_____
d.	Parent / community coordinator	_____
e.	Support provider	_____
f.	School based coach	_____
g.	Coordinator of another grant (specify)_____	_____
h.	District administrator_____	_____
i.	Other (write in:)_____	_____

Years in District _____

a.	Elementary grades	_____	
b.	Middle grades	_____	
c.	High school grades	_____	

01❑	Multiple Subjects (self-contained classroom)		
		12❑	Physical Education
02❑	Art		
03❑	Business	13❑	Life Sciences
04❑	English	14❑	Physical Sciences
05❑	English as a Second Language	15❑	Biological Sciences
06❑	Health Science	16❑	Chemistry
07❑	Home Economics	17❑	Geosciences
08❑	Industrial/Technology Education	18❑	Physics
09❑	Languages other than English	19❑	Social Sciences
10❑	Mathematics	20❑	Special Education
11❑	Music	21❑	Other,(specify)_____

		Not prepared				Very prepared
a.	Analyze and prepare data for inquiry.....	1○	2○	3○	4○	5○
b.	Lead the "Cycle of Inquiry".....	1○	2○	3○	4○	5○
c.	Lead teachers in instructional change.....	1○	2○	3○	4○	5○
d.	Address specific learning needs of English Language Learners	1○	2○	3○	4○	5○
e.	Address specific learning needs of low performing students....	1○	2○	3○	4○	5○
f.	Design instruction to build on students' racial and ethnic experiences and knowledge.....	1○	2○	3○	4○	5○
g.	Support reform work across schools in the LC.....	1○	2○	3○	4○	5○

Check (v) one.

Most likely I will...	
Return to full-time classroom teaching	1○
Enter school administration	2○
Seek other school level reform position	3○
Become a support provider	4○
Pursue district specialist role	5○
Pursue district administrator role	6○
Pursue a position outside of education	7○
Other (write in:)_____	8○

Thank you for your time and thoughtful response

Appendix 2: Field-Based Coaches Interview Protocol

Interview Objectives:

- *To understand the coach's role in the district and in individual schools*
- *To obtain the coach's perspective on the reform process in the district and in individual schools*

Questions (following a brief introduction regarding the purpose of the interview):

I. Coach Background

- How long have you been a Local Collaborative Coach?
- What other positions do you currently hold?
- What is your prior experience in this district and its schools?
- What is your prior experience with BASRC?

II. Coach Role

- In which schools do you have responsibilities?
- Do you have formal coaching responsibilities in the district central office?
- With whom do you share coaching responsibilities and how is the work divided?
- How do you organize your work?
    - Describe a typical day/ week/ month.
    - Whom are you expected to coach? (e.g. individual teachers, groups of teachers, school leaders, district administrators)
    - What are some of the differences/ similarities in your work at different school sites?
- What are your coaching goals for this year?

III. BASRC Work

- Please describe the goals of your Local Collaborative for Phase II.
- Can you tell me about any important changes have taken place in your district since the start of Phase II?
- Where is inquiry happening in your district and what does it look like?
    - Classroom level?
    - Grade or department level?
    - Whole school level?
    - School leadership?
    - District office?
- Can you give any examples of how inquiry is leading to changes in instruction/ practice?
- How do schools in your LC define and approach equity?
    - How / when is equity being discussed? Is there consensus within schools?
    - Across schools and in the district office?
    - How does this impact teacher practice? Can you give me any examples?
- Other specific questions could be about teacher community, distributed leadership structures, data and assessments, etc.

IV. Supports and Challenges

- What are some of the key supports for BASRC work in your district?
- What are some of the greatest challenges to advancing BASRC work in your district?
- What are the most significant supports and challenges you, personally, experience as a coach in this district?

V. Resources External to the District

- Are you working with a BASRC coach? If so, in what capacity?
- Can you describe any professional development experiences that have been useful to you as a coach?
- Can you comment on any learning opportunities you've had outside of the district that you have shared with staff at your school or district office?
- In addition to BASRC, what resources does the district draw on in its reform work?
    - Who makes decisions about resource allocation?
    - How does it impact your work?

VIII. Future Opportunities (following a question about whether they'd like to add any final thoughts that the interview didn't cover)

- Are there any upcoming meetings of events that my be of value to the evaluation?
    - Staff meetings?
    - Leadership team meetings?
    - Professional development?
    - Inquiry work?
    - Other?

Appendix 3: Role Definition for Field-Based Coaches (also known as Local Collaborative Coaches)

Local Collaborative Coaches 2002-2003

The Local Collaborative Coaches Network will meet 7 times in the 2002-2003 school year to provide participants with high quality professional development, a peer support forum, and resources to be successful in their roles as Local Collaborative Coaches.

The primary function of Local Collaborative Coaches is to build district and site capacity for engaging in Cycles of Inquiry to improve student achievement and close the achievement gap.

Responsibilities

- Act as a liaison and key contact within the Local Collaborative and with BASRC
- Engage in ongoing documentation of the work and sharing of lessons learned (including the coordination of compiling ROP documents)
- Work with school and district leaders to implement workplans and achieve goals
- Actively participate in the network by contributing expertise and supporting other Local Collaborative Coaches in building their skills

Expectations

- Attend all Local Collaborative Coach Network meetings
- Serve as a "Reader" for the yearly peer review process (ROP)
- Establish coaching relationships at more than one site within the Local Collaborative
- Have at least 0.2 FTE release time to fulfill responsibilities

Qualifications

- Experience with the Cycle of Inquiry (COI) and a strong commitment to using the COI to close the achievement gap
- Experience in leading and facilitating change processes
- Strong working relationships with leaders in the Local Collaborative

Stipends and Contracts

A stipend of $5,000 will be paid for each fully participating Local Collaborative Coach. This stipend can either be paid directly to the Local Collaborative Coach or to the district office to subsidize the cost of release time. Whichever party receives the stipend will enter into a contract with BASRC. Stipends will be paid in 2 disbursements, one in the fall of 2002 and one in early summer of 2003. If a Local Collaborative Coach does not fulfill the terms of the contract, a portion of the stipend may be withheld.

Appendix 4: Demographics of Schools of Case Study Coaches

	Grade Span	Enroll	Free or reduced meals	Eng. Learners	Asian	Hispanic	Afr. Am.	White
Coaches 1 & 2								
School A	6-8	586	54.58	25.13	29.23	12.65	27.52	22.91
Coach 2								
School B	9-12	1245	38.33	19.68	37.83	12.26	22.82	19.35
School C	K-7	369	26.81	17.89	31.98	6.50	3.52	38.75
School D	K-5	322	79.10	27.10	31.16	11.53	34.27	11.21
Coaches 3 & 4								
School E	9-12	1586	14.31	13.81	41.99	15.20	6.68	36.00
Coach 4								
School F	K-6	821	16.57	13.52	71.38	4.99	4.38	19.00
School G	K-6	869	4.26	10.13	80.79	3.11	2.88	13.23
School H	K-6	579	24.87	15.03	37.48	16.75	9.33	31.95
School I	7-8	902	22.62	10.98	44.13	13.53	6.32	35.59
Coach 5								
School J	9-12	118	0.00	0.00	14.41	45.76	5.08	34.75
School K	K-6	452	22.48	22.57	25.88	35.84	3.54	34.29
School L	K-6	402	21.93	15.42	25.87	37.56	3.73	32.59
Coach 6								
School M	K-6	601	19.31	12.15	36.94	17.97	6.99	37.44
School N	K-6	454	8.58	5.51	14.98	17.84	5.95	60.79
Coach 7								
School O	7-8	1076	29.86	9.85	24.43	36.90	6.60	31.51
School P	9-12	2148	21.23	7.22	25.61	32.73	5.12	35.61

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